

Industrial Focus

Technical Services Process Overview

- 🔗 **STEP 1** - A technical services idea, or Technical Services Proposal (TSP), is entered on the BPA Energy Efficiency web site: at <http://www.bpa.gov/Energy/N/projects/Industrial/commissioning/>. (Click on the "Continue" button at the bottom of that web page to see the TSP form.)

Note: TSPs may be submitted by anyone, such as a consultant who has an existing working relationship with the target facility, a BPA engineer working with the facility and the servicing utility, or utility staff working directly with the facility.

- 🔗 **STEP 2** - When the TSP is submitted; the Energy Efficiency Representative (EER) receives an e-mail and contacts the submitter to let them know the TSP has been received. The EER also may obtain more information regarding the proposal. The EER may consult with a BPA engineer to discuss the TSP and the BPA engineer may contact the submitter.
- 🔗 **STEP 3** - When the EER has the necessary proposal information, the EER discusses the TSP with the servicing utility to make sure they are willing to: 1) support the TSP, 2) provide assurance to pursue reasonable projects identified by the service, and 3) provide any appropriate market incentives for the project (i.e., through a Conservation Augmentation (ConAug) contract or Conservation & Renewables Discount (C&RD) funds).
- 🔗 **STEP 4** - The BPA EER and Industrial Program lead either approve or disapprove the TSP.
- 🔗 **STEP 5** - If the TSP is approved, a BPA engineer develops a Statement of Work (SOW) to implement the TSP working with the submitter and other parties, as needed, including the consultant, utility, facility, and EER. The approved SOW becomes the core of a "Release" issued under a Master Agreement or other contracting mechanism obligating BPA to fund the technical services. The SOW will require deliverables such as a document acceptable under ConAug or C&RD project proposal requirements. All final studies and project proposals will be delivered to the facility.
- 🔗 **STEP 6** - Facility managers make the determination whether or not to do the work, and the utility determines whether to sponsor the work under a BPA program.
- 🔗 **STEP 7** - Performance and Payment: The consultant provides the technical services. BPA will review the work and make a determination to accept it. If the work is acceptable, BPA will then approve invoices for payment.
- 🔗 **STEP 8** - When an incentive is part of the agreement and the project is completed, measured, and verified, the utility provides an incentive payment to the facility.

